

LOC Questions and Clarifications Memorandum

To: Solicited Vendors for Letter of Configuration (LOC) Number 41569/42247, dated January 27, 2016 for the Mississippi Department of Human Services (MDHS) and Department of Finance and Administration (DFA)

From: Craig P. Orgeron, Ph.D.

Date: March 3, 2016

Subject: Responses to Questions Submitted and Clarifications to Specifications

Contact Name: Chris Grimmer

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LOC Number 41569/42247 is hereby amended as follows:

1. Item 3 Procurement Project Schedule is being modified to read:

Task	Date
Proposals Due	<u>Friday, March 11, 2016</u> Thursday, February 18, 2016 at 3:00 p.m. Central Time
Proposal Evaluation	<u>Monday, March 14, 2016</u> Friday, February 19, 2016 – <u>Friday, March 25, 2016</u> Friday, March 4, 2016
Notification of Award	<u>Wednesday, March 30, 2016</u> March 8, 2016
Contract Negotiations	<u>Thursday, March 31, 2016</u> March 9, 2016 – <u>Friday, April 15, 2016</u> March 25, 2016
Awarded Work to Begin	<u>Monday, April 18, 2016</u> March 28, 2016

2. Item 15.1 is being modified to read:

“Vendor must deliver the response to Chris Grimmer at ITS no later than Friday, March 11, 2016 ~~Thursday, February 18, 2016~~, at 3:00 P.M. (Central Time). Responses may be delivered by hand, via regular mail, overnight delivery, e-mail, or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF PROPOSALS. It is solely the responsibility of the Vendor that proposals reach ITS on time. Vendors should contact Chris Grimmer to verify the receipt of their proposals. Proposals received after the deadline will be rejected.”

3. Attachment A Cost Information Form is deleted and replaced with Revised Attachment A-1 Cost Information Form.

Vendor must include in their proposal a response to each amended requirement as listed above. Vendor must respond using the same terminology as provided in the original requirements.

The following questions were submitted to ITS and are being presented as they were submitted, except to remove any reference to a specific vendor. This information should assist you in formulating your response.

Question 1: Has the ITS receive a full product demo? I would suggest reviewing DeskSite, FileSite and the office integration module.

Response: Both DFA and MDHS have seen a demo of some iManage products.

Question 2: The State of Mississippi Technology Infrastructure and Architecture Plan indicates that the State has an initiative to implement applications in the cloud. Would ITS be interested in implemented WorkSite hosted in the iManage Cloud environment?

Response: Not at this time; migration to the iManage cloud environment is outside the scope of this LOC.

Question 3: The Cost Information Form for the MDHS Configuration doesn't have a reference to any worksite client; a) is MDHS planning on using the application solely through the WorkSite Web application? b) Is the plan not to provide integrations with desktop application?

MDHS

Response: a) Highly likely, but it depends on the assessment findings.
b) If by desktop application, you mean Microsoft Office or similar desktop clients, the answer is probably no. If by desktop application software you mean 'legacy applications', then the State requires current capabilities and services used by legacy applications to continue.

Question 4: The configuration includes IRM (iManage Govern), which brings couple of questions:

- a) How records are currently managed?
- b) Is MDHS managing paper records?
- c) Is there a filing plan and records retention schedule in place?

MDHS

Response: a) Worksite is the document management system used to organize case documents for TANF, SNAP and Child Support Enforcement. Users are able to view, modify, post or delete documents in worksite based on their security profile. There are standard operating procedures embedded in the Program Policy Manuals for collecting and accessing these records as well as quality control reviews for adherence. There is no other formalized records management policy that applies. The State expects the Vendor to perform a deeper discovery and assessment when the project begins. This LOC is not

intended nor is the state in a position to do the discovery for the Vendors during the LOC process.

b) Yes, to some degree. That said, The State would like the Vendors to understand the primary focus of the LOC is to migrate the current document management services, where appropriate to the software listed in Appendix A. Current paper records processes are not the focus of the LOC.

c) Not in a comprehensive, formal sense, but the State expects the Vendor to recommend proven practices regarding all implementation planning for the state to consider before the actual migration/implementation plan is firmed up. That said, the scope of the LOC is to implement and migrate to the software listed in Attachment A.

Question 5: What desktop applications are currently supported?

DFA

Response: DFA will be using the Microsoft Office 2013 Suite in the first half of 2016, and uses Adobe Pro 9 for PDF publishing, as the primary desktop applications.

MDHS

Response: MDHS is using Microsoft Office 2013 including Microsoft Exchange along with various 3rd party applications that run on select desktops but they are too numerous to list.

Question 6: The configuration for DFA includes the EMM module, OffSite and FileShare but no mentioned to DeskSite or FileSite, we need to confirm that client application is not part of the integration.

DFA

Response: During DFA's research with migrating from Worksite to iManage, the products listed in this LOC were recommended. However, should Vendors believe additional products are needed Vendor must explain why and provide pricing to be listed individually. Refer to Clarification Number 3.

Question 7: Could you provide a list of supported application for DFA?

DFA

Response: Refer to the response to Question No. 5.

Question 8: For Mobile access, what kind of devices will be supported?

DFA

Response: iPhones, Google OS based devices, iPads, and Windows based tablets.

Question 9: Is ITS planning on implementing the Matter Centric Model for MDHS and DFA?

DFA

Response: No, Matter Centric Model is not something DFA will require. DFA uses WorkSite currently as a data warehouse, a repository of policies, procedures, purchases, rules, regulations, and interaction history internally and with external entities.

MDHS

Response: No, MDHS is not planning to implement the Matter Centric Model as part of this migration.

Question 10: Do you have requirements for the Worksite MP to WorkSite migration?

Response: No, detailed requirements to be identified during the environment assessment. Refer to Items 6 and 7 of the LOC.

Question 11: Could you provide an inventory of MP objects that need to be migrated, including Facilities, Workspaces, and Knowledge Base Facilities?

DFA

Response: Yes, DFA will provide the inventory to the awarded Vendor.

MDHS

Response: MDHS will require the assistance of the awarded Vendor to produce this inventory.

Question 12: Are document classes currently configured in the WorkSite MP Environment?

Response: At this time, neither DFA nor MDHS knows if the document classes are configured in the WorkSite MP Environment.

Question 13: Has the WorkSite MP Database schema been extended? If so, could you provide a list of custom fields, including purpose and data type?

Response: At this time, neither DFA nor MDHS knows if the WorkSite MP Database schema has been extended.

Question 14: Could you provide a complete list of servers currently deployed to support the MDHS environment?

MDHS

Response: Yes, MDHS will provide the complete list of servers to the awarded Vendor.

Question 15: Will the vendor be providing any project management services other than the initial plan in the RFP?

DFA

Response: DFA is seeking services for helping upgrading the systems, migrating existing data to the new version/platforms, and providing training/having material available to/for DFA staff that administer the systems. Further, DFA would need some occasional support post upgrade if something should fail, deviate from the norm, or if DFA staff had an occasional question.

MDHS

Response: The State expects the Vendor to provide whatever project management services are required to successfully execute the engagement. It is not in the State's interest to prescribe what phases will require a project manager

and what phases will not. It will depend upon the discovery and final assessment findings.

Question 16: iManage Govern (formerly known as Records Manager) is listed in attachment A of the MDHS environment, but not in section 2. Should our response to the RFP include an upgrade of the Records Management System and the cost to provide those services?

MDHS

Response: The Vendor's response should include the cost to migrate from Records Manager to iManage Govern. The associated cost should be listed in Attachment A.

Question 17: CMS is mentioned in section 2. Is this the WorkSite Application Server or a different server?

DFA

Response: CMS is the Configuration Management Server, a part of the cluster.

MDHS

Response: There is a Worksite MP CMS Application Server in the Worksite MP Server cluster.

Question 18: Have any customizations been made (outside of the built-in controls) to the WorkSite web servers?

- a) If so, is the vendor responsible for recoding the changes to the new WorkSite Web platform?
- b) If so, would a list of those changes be provided to us?

DFA

Response: No.
a) N/A
b) N/A

MDHS

Response: Yes.
a) Yes.
b) Yes, to the awarded Vendor.

Question 19: How many validation (e.g. lookup) fields are you using in each environment?

DFA

Response: At this time, DFA does not know how many validation fields are being used in each environment.

MDHS

Response: Approximately 30.

Question 20: Only iManage provides the specifications for IDOL Indexer hardware. Have you filled out the IDOL Indexer sizing document for each environment? If so, may we

have a copy? If not, we would like to work with your team to complete the iManage IDOL Indexer sizing document and submit it to iManage for review.

DFA

Response: DFA has an Index Server as part of the cluster, but has not seen any reference to IDOL, or functions that may perform.

MDHS

Response: At this time, MDHS is not familiar with the IDOL Indexer sizing document.

Question 21: What is the anticipated growth for 3-5 years in each system? What has been the historical growth for the same period?

DFA

Response: DFA doesn't anticipate growth over the next several years which would require any deviation from the products listed in this LOC which are based on the original recommendation to migrate from Worksite to iManage. DFA's use, data volume, accounts, and other measurable components will remain constant in the foreseeable future.

MDHS

Response: MDHS anticipates a slight steady growth, but not very large.

Question 22: Section 7.5.2 states:

"The Vendor proposal must provide detailed hardware description, specifications and capacities for the successful implementation/migration of the proposed solution with full functioning (1) development, (2) quality assurance, (3) production and (4) training environments (including disk storage configuration, memory requirements, networked interface, tape backup and any other system components required). Vendor must specify hardware configurations that are not brand specific and must include detailed cost for all hardware identified."

a) How is the above different from 7.7?

"During the initial project phases, the Vendor will be required to prepare a detailed recommendation for hardware and software."

b) If we are not a hardware vendor but can recommend specifications; are we required to submit an exception form?

Response: a) Item 7.5.2 and Item 7.7 are not different.
b) No; Vendors must provide recommended specifications as requested.

Question 23: Are updating the non-web clients and providing support for client deployment part of the RFP cost/services requirements?

DFA

Response: DFA would provide the server environment, the virtual servers at ITS, DFA would require assistance installing iManage and all necessary components, and configuring the cluster, as well as data migration from MP to iManage. In addition DFA would require support in the event that system experience errors, or there is any other technical or operating question DFA would have.

MDHS

Response: If Vendor believes this is required then Vendor must explain in detail why and provide any cost associated for the proposed solution to be fully functional and successful.

Question 24: How many versions and how many document types are present in the current DFA WorkSite MP implementation?

DFA

Response: At this time, DFA does not know how many documents and versions are stored in the solution.

LOC responses are due Friday, March 11, 2016, at 3:00 p.m. (Central Time).

If you have any questions concerning the information above or if we can be of further assistance, please contact Chris Grimmer at 601-432-8208 or via email at chris.grimmer@its.ms.gov.

cc: ITS Project File Number 41569/42247

Attachment: Attachment A-1 Revised Cost Information Form